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Strictly Private & Confidential
RC Administration Limited
1a Park Lane
Poynton
SK12 1RD

25 September 2024

Dear Sir or Madam

AJ Bell SIPP - Bradley Russell - ABQC2QS
Your Reference: 270922

Further to our previous correspondence regarding the transfer of the above pension plan, we have not yet received the full transfer funds.

Please send the funds via electronic payment to the following bank details:

Bank:	Bank of Scotland, New Uberior House, 11 Earl Grey Street, Edinburgh, EH3 9BN
Sort Code:	12-27-34
Account Number:	06980213
Account Name:	Sippdeal Trustees Ltd Payments In
Payment Reference:	ABQC2QS

If you are transferring assets in-specie, please let us know as soon as possible once these have been transferred. Please liaise with our Transfers In Team by email at transfersin@ajbell.co.uk or by telephone on 0161 876 3017 quoting the above reference to coordinate the transfer of assets, if applicable.

Upon completion of the transfer, in order to prevent any delay in allocating the funds to the client's SIPP, I would be grateful if you could send us the full transfer information relevant to this transfer as soon as possible. Please ensure you provide this information for uncrystallised and/or crystallised transfers. This should confirm the following:

- The transferring scheme's HMRC Pension Scheme Tax Reference number –
- The total transfer value – £
- Whether the transfer contains any crystallised benefits, along with the relevant details:
 - o The crystallised value of the transfer - £
 - o The uncrystallised value of the transfer - £
 - o Details of whether each tranche is in flexi or capped Drawdown -
 - o The amount designated to DD per tranche -
 - o Amount of lump sum allowance (LSA) used per tranche – £
 - o Amount of lump sum and death benefits allowance (LSDBA) used per tranche – £
 - o If LSA and LSDBA used unavailable, confirm LTA% used per tranche -
 - o Confirmation whether the tranche first came into payment (a) before 6 April 2006, (b) before 6 April 2024 or (c) on or after 6 April 2024
 - o Last review date per tranche (if capped drawdown) -
 - o Max GAD per tranche (if capped drawdown) - £
 - o Income paid in current year per tranche - £
- Details of any transitional protection relating to the transferring benefits and/or member (including whether the member retains protected pension age benefits) –

- If the transfer contains uncrystallised rights and the member has enhanced protection, please can you confirm the following:
 - o Value of uncrystallised rights at 5 April 2023 – £
 - o Value of uncrystallised rights at 5 April 2024 - £
- Whether the transfer is part of a block transfer – if yes, please provide details of the block transfer and the associated members (including whether the member has transferred protected pension age benefits on a block transfer basis) –
- Whether the transfer value derives from a Pension Sharing Order or Provision –
- If the member is subject to the Money Purchase Annual Allowance –

If you have any questions, please contact the transfers team at transfersin@ajbell.co.uk.

Yours faithfully



Helen Potts
Head of Transfers

